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Dear friends and colleagues,

Please find attached the first issue of 2010 of our newsletter

***"Business Bavaria"***

This issue provides you with information and news about Bavaria's economy and business sectors, news on scientific research and groundbreaking developments, as well as tourist information.

You may also download this issue soon on our homepage:

<http://www.invest-in-bavaria.de/en/news/newsletter/>

If you need specific information on Bavaria or if you have any questions, please don't hesitate to contact us anytime.

We hope you enjoy reading "Business Bavaria".

Best regards,

The State of Bavaria Team

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### What's inside

- **World's largest solar power plant to be built in Lower Bavaria**
- **If it's big, it's from Bavaria: state architects plan and build world's largest real estate projects**
- **Bavaria: ready for a robust recovery**
- **B2W: Bavaria's service providers serve the world**

### Solar boom in lower Bavaria

- **World's largest solar power plant to be completed in 2010**
- **60 other plants now under development**
- **100 house-top PV facilities joining power grid every day**

Solar power is booming worldwide, with the output from PV (photovoltaic) facilities increasing at 50% + annual rates.

Lower Bavaria is the epicenter of the boom. The region has more photovoltaic-based solar power facilities than anywhere else in the world, reports the Süddeutsche Zeitung.

The region's government states that Lower Bavaria is home to no less than a world-best 80 solar parks, in which banks of PV panels are stationed in fields.

And this lead is going to get a lot larger over the next year.

Over the next twelve months, 60 solar parks will be completed. One of them will be the largest in the world: the €180 million, 190 hectare-large project on the Harthof estate. It will produce 63 MW of electricity a year – enough to meet the needs of 18,000 households.

The park is being developed by the company managing the wealth of the Regensburg-based Thurn und Taxis dynasty, one of Europe's oldest and most storied families.

Several other Lower Bavarian parks will also be among the world's largest, notably the 52 MW and 20 MW ones in Straßkirchen and Mengkofen.

Lower Bavaria's homeowners are matching the pace set by the region's developers of solar parks. The number of housetop PV facilities in the region is increasing at an incredible 100-a-day rate – about half of the Bavaria-wide total.

### Profit-producing PV panels

Bavarians are highly environmentally minded. But the statewide commitment to protecting the environment is not the prime cause of the boom.

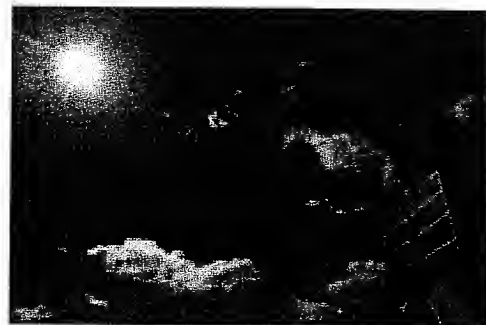
It is, rather, a simple fact. "Solar power is simply the most attractive and secure investment around nowadays," states energy expert Ludwig Trautmann-Popp.

And that's because of the generous prices guaranteed to be paid over the next 20 years to producers of electricity fed into the public grid – currently 43 cents (house-top facility) and 32 cents (stand-alone facility) per kilowatt.

These prices have joined with the 30% drop over the last twelve months in the prices of PV panels and facilities in unleashing the boom.

### key facts, figures and forecasts

in 2009, 10,000 new housetop PV facilities will have been installed in Lower Bavaria, reports local utility Eon Bayern. Not bad for a region of 1.2 million.



source: Gettyimages, all images 14349401



source: JUPITERIMAGES-082798193

## Munich: headquarters of newest and largest renewable energy company in the world



Source: www.pressphoto.de

Son.

Desertec Industrial Initiative GmbH was founded on October 30th 2009 in Munich. The company is to lead manage the €400 billion project, which will set up solar facilities in the Sahara. These in turn will supply Europe with 15% of its electricity by 2015. CEO of the newly-founded company, whose shareholders include Siemens, MAN, Munich Re and other Bavarian companies, is renewable energy veteran Paul van



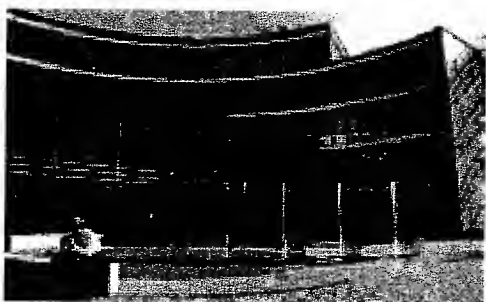
Source: www.rtr-rlp.de

## From Bavaria: the businesswoman of the year



Source: www.microsoft.de

Angelika Gifford, a member of Microsoft Germany's management, has won the coveted 'female manager of the year' award. The 44 year old has been with Microsoft Germany, which is headquartered in the northern Munich suburb of Unterschleißheim, since 1993.



Source: www.microsoft.de

## Bavaria: ready for a robust recovery

Country-best rates of unemployment and consumption will join with the forthcoming export recovery in giving the state high rates of growth in 2010 and beyond.

Two of the three pieces of a robust recovery for Bavaria were already in place. Then the OECD provided the third and final one.

In September, the Organization for Economic Cooperation and Development joined the IMF and other leading bodies in announcing that the world's GDP and volume of trade will both rise 2%+ in 2010.

This is a bit of good news for Germany, which, although only 61st in terms of size and 14th in population, is the world's second largest exporter.

This is a bit of excellent news for Bavaria, whose manufacturing sector has long been one of the world's most successful in selling its products abroad. Just under half of the sector's sales are made outside Germany.

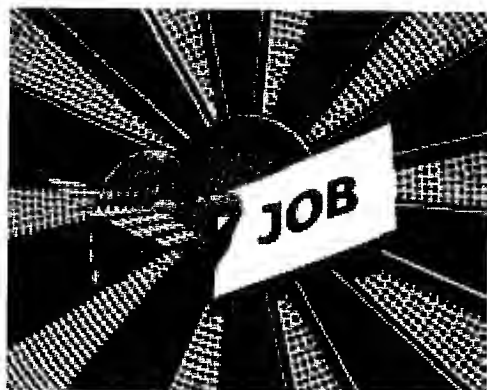
No wonder that the sector has been in the doldrums during the past few quarters.

The lack of impetus from the sector makes the state's overall performance in the crisis even more remarkable.

As of September 2009, Bavaria's rate of unemployment came to 4.8% - best among Germany's states and enviably and unattainably low for most industrialized countries.

The twin engines of this high rate of employment have been consumer consumption, which remained strong throughout the three quarters of recession, and the state's service sector (see related article).

The sector has been the prime beneficiary of the resolve shown by state consumers to maintain their standards of living and by Bavaria's businesses to pursue development and sales campaigns.



Source: www.foto.com

OECD

ORGANIZATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT

## INSM's 2009 rankings of Germany's cities: yet another first place finish for Munich

Munich is the best place to do business and live among Germany's fifty major cities. That's the finding of the 2009 edition of the annual study conducted by INSM (the Institute for a New Market Economy) and by WirtschaftsWoche, the authoritative business weekly.

The study was launched in 2003 and uses 96 socioeconomic indicators to compile its rankings. Munich has finished first in all six of the rankings' years.

"None of Germany's other 50 largest cities has developed as well as Munich during 2003-2008," notes INSM.

The indicators include best operating conditions for business, availability of attractive jobs, and highest quality of life.

The 2009 study found that Munich has the highest overall level of performance of Germany's cities.



"Bavaria's capital city has the highest per capita taxable income and purchasing power of any city in the country. Munich also has the fewest number of unemployment recipients, and the country's second lowest rate of unemployment, plus the second highest percentage of highly-qualified staff members," stated Dieter Rath, INSM's CEO, in explaining his institute's findings.

### key facts, figures and forecasts

**1.5.** That's the - top! - mark given to Munich for service in a comparison of Europe's top five airports recently released by the Arthur D. Little management consultants.

Equivalent to A- the mark was awarded to Munich for its best-in-Europe speeds of passenger access to gates and times of flight transfer.

**Number one.** Bavaria ranks first among Germany's states in a key area: number of high-techs founded. Those are the findings of the 2009 edition of the study conducted annually by the Center of Research into Europe's Economy ([www.zew.de](http://www.zew.de)).

Bavaria's lead over its fellow states is particularly pronounced in the fields of software, high-tech services and research-driven manufacturing.

**One billion.** That's the number of coins produced in 2008 in Bavaria's State Mint. It is thus one of the main producers of coins for the 15 countries in the Eurozone. The Mint is also a main supplier for countries as far flung as Azerbaijan, Bangladesh and Morocco.

### Gesamt-Ranking der 50 größten Städte nach wirtschaftlicher Situation und Dynamik

	Niveau	Dynamik	Gesamt	Rang
München	27.7	55.0	120.7	1
Frankfurt/Main	27.0	45.0	122.0	2
Stuttgart	27.7	59.5	127.2	3
Mannheim	24.6	57.6	122.2	4
Düsseldorf	25.0	34.6	121.6	5
Wuppertal	23.2	57.9	121.1	6
Karlsruhe	20.9	50.5	115.5	7
Münster	27.7	54.1	115.9	8
Hamburg	26.2	55.0	113.2	9
Mannheim	24.2	54.9	111.4	10
Köln	24.3	33.7	110.1	11
Augsburg	20.8	33.0	109.4	12
Frankfurt	23.7	28.7	108.4	13
Hamburg	27.0	26.2	107.5	14
Köln	25.4	30.0	107.3	15
Mannheim	24.7	21.0	107.1	16
Leipzig/Halle	21.4	25.4	103.9	17
Münster/Hagen	21.4	25.1	103.7	18
Stuttgart	27.5	25.0	103.5	19
Aachen	23.7	27.8	103.5	20
Düsseldorf	24.8	24.7	102.2	21
Hannover	20.4	44.4	101.0	22
Köln	23.2	47.7	101.3	23
Düsseldorf	20.2	24.2	102.7	24
Köln	23.7	27.5	101.5	25
Köln	24.7	23.4	101.2	26
Garmisch	24.0	23.4	99.5	27
Mannheim	23.7	23.0	99.0	28
Frankfurt/Main	24.7	27.5	99.1	29
Köln	21.9	24.2	98.1	30
Leipzig/Halle	21.1	23.0	98.0	31
Düsseldorf	21.7	23.2	98.0	32
Köln	20.0	27.2	97.1	33
Leipzig/Halle	21.4	23.1	96.5	34
Köln	23.1	27.4	96.5	35
Mannheim	22.2	23.0	94.0	36
Köln	22.1	23.0	94.0	37
Düsseldorf	20.0	23.4	93.0	38
Köln	22.1	23.0	93.0	39
Düsseldorf	20.2	23.2	93.0	40
Köln	20.2	23.2	93.0	41
Köln	20.2	23.2	93.0	42
Köln	20.2	23.2	93.0	43
Köln	20.2	23.2	93.0	44
Köln	20.2	23.2	93.0	45
Köln	20.2	23.2	93.0	46
Köln	20.2	23.2	93.0	47
Köln	20.2	23.2	93.0	48
Köln	20.2	23.2	93.0	49
Köln	20.2	23.2	93.0	50

Source: www.insm.de



## B2I

### Bavaria's service sector thrives by going international

Prognos, the Swiss economic research organization, recently ranked Munich's B2B and research service sectors first among those of Germany's 413 cities and counties.

Here's why:

#### **Large and locally-known:**

The first half of the thumbnail description of Bavaria's service sector is entirely correct.

#### **Large:**

According to the latest figures available, the sector is comprised of nearly 429,000 companies. Their annual sales come to more than €460 billion.

And definitely not just locally-known:

The following areas of the state's service sector have received high marks in national, European and worldwide rankings:

**market research/forecasting  
logistics and freight forwarding  
infrastructure planning and implementation  
architecture, urban planning and construction, and real estate development  
legal counsel and management consulting  
research and high-tech  
intellectual property  
financial services, and especially asset management, and M & A  
professional education**

All of these services are provided in the "B" (business) segment.



"That fact is anything but surprising. The size, specializations and sophistication of a service sector are directly dependent upon those of the business community patronizing it," notes Dr. Wolfgang Würfel, partner at , the Munich-based international law firm.

"Bavaria has one of the most highly-developed and most international business communities in the world. The community is comprised of companies which, although active in the widest variety of sectors, share two traits: they have a track record of producing innovative products and services, and a vocation to sell these offering on international markets," he adds.

Würfel adds: "This applies to all companies, from the smallest of the family-owned SMEs (small and medium-sized enterprises) to such corporate giants as Siemens, BMW, Linde and MAN. This especially applies to the more than 1200 non-German technology companies based in the state," he concludes.

Dr. Felix Breuer, CEO of the Bavarian Financial Center, has identified another cause of the sector's size and sophistication:

"Bavaria is now well into its third decade of being the most successful of Germany's states. These many years of successful operations have led to a large-sized accumulation

of wealth and of expertise in launching new businesses and new areas of technology," notes the financial expert.

He adds: "This symbiotic relationship between innovation and financial services is found in only a very few regions in the world."

Peter Wolf, CEO of the Munich-based Phase 4 media agency, has another explanation for the success of the state's service sector:

"Creativity, plain and simple, creativity. Whether is to be marketing campaigns, or special effects or environmentally-ways of transporting goods, a huge number of innovations in the service sector have stemmed from Bavaria."

#### **Names to know in Bavaria's B2I service sector**

##### **GfK Group**

Nuremberg

One of the world's largest five consumer research companies

##### **Rödl & Partner**

Nuremberg

Germany's largest domestically-owned provider of legal, accounting, auditing, tax consultation and other B2B services. Founded in 1977 by Dr. Bernd Rödl, the company now has a staff of 3000. They work in 82 offices located in 40 countries.

##### **CESifo GmbH/The Ifo Institute for Economic Research / Center for Economic Studies**

Munich

Compilers of the widely-followed Business Climate Index (Munich Society for the Promotion of Economic Research)

##### **Roland Berger Strategy Consultants**

Munich

One of the world's five largest management consultancies.

##### **Fraunhofer Society for the Application of Research / Max Planck Society for the Advancement of Science**

Both of these national networks of research facilities have their headquarters in Munich

##### **Munich Financial Center Initiative**

Munich-based association of Bavaria's leading providers of financial services, including Allianz and Munich Re.

##### **Bavarian Financial Center**

Munich

Hub of the city's financial community, stager of events, and maintainer of portal providing information on issues and jobs available.

## Inside the state Crisis? What crisis? Ingolstadt keeps on rolling

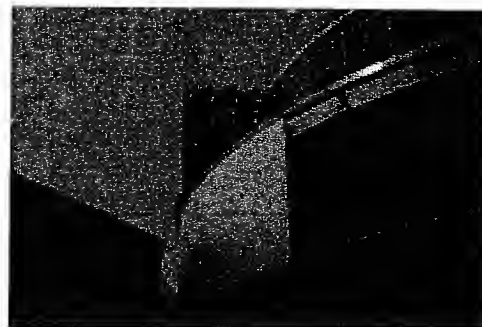
Year-after-year of strong growth and near-full unemployment, thanks to companies moving from strength to strength and increasing staff size.



source: Ober-Duerst\_Fotolia.com

Sounds like 2006 or 2007.  
But it's 2009 in the central Bavarian city of Ingolstadt (population: 123,000) and its surrounding region.

As of September 2009, the region had a rate of unemployment of 3.3% - lowest in Germany. This rate was the product of the sustained growth turned in by its locomotive companies – among them Audi, EADS and Saturn. This growth in turn has made the region one of the fastest growing in Germany over the past half-decade.



### Strong-performing companies

#### - Audi.



source: www.audi.de

In 2008, the manufacturer of high-end cars registered its 13th year of record annual results. The manufacturer has forecast strong profitability and sales for 2009. That's good news for Ingolstadt, as the company's facilities in the region employ some 32,000 people.



#### - EADS



source: www.eads.de

The world's largest aerospace company maintains its 700,000 square meters-large Military Air Systems operations (the largest in Europe) in nearby Manching.



#### - Media Saturn



Headquartered in Ingolstadt, the company is Europe's largest TIME (technology, information, media and entertainment) retailer, maintaining 800 stores on the continent. Media-Saturn's headquarter operations employ some 2,000 persons.



## Planning the world's mega-sized developments If it's big, it's from Bavaria

Thomas Glöckner. Rainer Schmidt. Sven Pott.

You probably don't know the names of these leading Bavarian architects.

Unless you happen to be building something really really big and prestigious. Like a stadium for the Olympic Games. Like a new city in China or Dubai. Or like a resort covering several islands in the Gulf.

In these cases, you not only know these architects. You've commissioned them with the planning and even building of your mega-projects.

Such as Beijing's National Indoor Stadium. The commission to plan this centerpiece of the 2008 Olympics was one of the most sought-after in the world.

Rather than one of the world's heavyweight firms based in the world's major metropolises, the winner was a relatively unknown architect, Thomas Glöckner, principal of the Nuremberg-based Glöckner3 Architekten GmbH.

Why did Glöckner win?



"We create designs encompassing the surroundings and the society in which the structure will be situated," he is reported as saying.

These facts joined with the sheer beauty of the design in making the company a powerhouse in the field of athletic facilities. To date, the company has designed 34 of them.

The skills used in creating the stadiums and their ilk are now being employed to build new cities and other mega-projects. Prime among them is the misleadingly-named Convention Center in Doha, Qatar. The Center is actually an entire city-in-a-city, replete with apartments, cultural facilities and other items.

### Bringing greenery to new cities and facilities



Rainer Schmidt is giving the term "landscape architect" a new and much broader meaning.

Landscape architects used to be the final link in the chain of planning real estate projects. Thanks to Schmidt, they have now become the first ones.

Based in Munich, Schmidt designs terrains upon which campuses (in Dalian, China; and Bielefeld and Düsseldorf, Germany), new cities (in Kazakhstan, Turkey, Libya and Abu Dhabi), palaces (Abu Dhabi) and mosques (Algeria) are then built. Schmidt has even planned a resort covering several islands.

One of the newest and largest projects is Doha, Qatar's Aerospace City. The commission involves creating a terrain accommodating an airport expansion, a flight school and residential complexes.

The secret of Schmidt's success: "We know how to design terrains imparting a unique and unmistakable identity to each project."

These huge and complex commissions become even more amazing when one considers the size of Schmidt's company's staff: 29.

"Always plenty to do around here," notes Schmidt laconically.

### Good for company finances, personnel and efficiency – and for the environment

For Sven Pott, this ability to get the most out of staff members goes a long way to explaining why Bavaria's architects are so successful on a worldwide scale.



"We know why to use resources – human, technical and otherwise – with the utmost of efficiency. This ability explains why Bavaria's architects are so successful on a worldwide scale: unexcelled cost/quality ratios and an unbeatable track record of completing projects on time and in budget," notes the Munich-based architect.

He adds: "Our success is, of course, attributable to the attractiveness of our designs. Even more important, in my opinion, is our capability of producing attractive designs expressing customer wishes and meeting customer needs."

Add in a mastery of such challenging techniques as working with a wide variety of materials and of producing green and energy-conserving buildings, and you have an explanation of the remarkable track record being together by the Munich-based Pott Architekten und Ingenieure.

Founded a scant ten years ago, the 8-person firm now operates on a worldwide scale: in China (banks of skyscrapers), in Kazakhstan (luxury hotel in Astana), Spain (residential complex on the Canary Island of Lanzarote) and elsewhere.

This capability of turning customer ideas into beautiful and practical structures has also made Pott the go-to firm for the planning, building and revamping of mansions.

"Revamping is where architects are really put to the test, as such commissions require the identifying and preserving of the structure's soul while modernizing and often expanding its component parts," Pott notes.

"One reason why Bavaria's architects are leaders in this field is the simple fact that we get a lot of practice. The state and its property-owners have committed themselves to adequately maintaining the hundreds of thousands of buildings enjoying landmark protection," he concludes.

## Makers of the state



**Ludwig Bölkow:** taking Bavaria to the skies

Centered around Munich, southern Bavaria is the most complete aerospace center in the world. Each of the other bases is strong in one of aerospace's seven sectors. Several are big in two or three of them.

Southern Bavaria is strong in all seven: aircraft, launchers, military-use missiles, helicopters, space missions, aerial monitoring operations and GPS and other satellite-based services.

That southern Bavaria has achieved this position of pre-eminence is thanks to two decisions.

In the early days after World War II, Bavaria's government decided to specialize in developing sunrise industries. One of them: aerospace.

In 1958, Ludwig Bölkow relocated his aircraft design office from Stuttgart to the southeastern Munich suburb of Ottobrunn.



Born in 1912, Bölkow studied engineering. His bent for new aircraft became rapidly apparent at his first job – at the Augsburg-based Messerschmitt AG. It was there Bölkow played a key role in developing the world's first jet-powered fighter plane.

Bölkow had two great talents. Each made his move to Ottobrunn of key importance to Bavaria.

He was a highly successful entrepreneur, presiding over the transformation of his office into Germany's largest aerospace corporation. After several mutations, the corporation became one of the core components of today's EADS, which is the world's largest aerospace corporations.

This rise was due to Bölkow's unexcelled ability to come up with market-making innovations. The list of these is very long, including the steering, balancing and propulsion systems turning satellites from unsophisticated top-ons of space missions into fully-controllable and capable workhorses of communication, navigation and environmental protection.

The latter was also one of the major thrusts of Bölkow's work. He single handedly pushed the development of photovoltaic, hydrogen-based and other sources of regenerative energy.

Bölkow died in 2003.

## Bavaria makes the world's movies

Go to the movies and you're going to Bavaria.

Once seated in the movie theater, you have entered the world of Bavarian technology.



The film you are seeing has most probably been shot with an ARRI camera.

All throughout the last 90 years, the Munich-based ARRI Group has been the world's largest and most innovative manufacturer and distributor of motion picture cameras.

How innovative: ARRI has been awarded no less than 13 Technical Oscars.

The company is now at the forefront of digital production and image quality maximization technologies.

One place in which ARRI cameras are put to work is Bavaria Film Studios. Located in Munich's southern reaches, the Studios are also responsible for the production of a large number of TV shows.

The footage shot with ARRI cameras is then cut and



processed using equipment manufactured by Kinton. Founded 61 years ago by the Zoller family and headquartered in the western Munich suburb of

Germering, Kinton is also the world's largest producer of high-end projectors.



Now headed by Renate Zoller, Kinton has also won a brace of technical Oscars. Like ARRI, Kinton is now supplying the technologies enabling the transition to 3D/digital movies.

The digitalization is being accompanied by an ever-greater use of computer-generated special effects. Bavaria is also at the forefront of this sector, being home to such companies as Effective Special Effects.



## Gear giving athletes an edge Head-to-toe apparel from Bavaria's sporting goods companies

### Helmets, eyewear and gloves

#### Uvex

Based in the central Franconian city of Fürth, Uvex is the world's leading producer of safety equipment, notably the helmets used by Tour de France cyclists and Formula One racers.

The company is also a major producer of sports gloves and eyewear for skiers.

#### Salewa

Aschheim

#### Schöffel

Schwabmünchen

Salewa and Schöffel produce mission-critical gear, the kind you need to climb up or ski down Mount Everest. The gears' straightforward designs and unvaryingly high quality have also made it popular with weekend athletic stars.

### Backpacks

#### Deuter

Augsburg

Lots of companies make backpacks. Many are very good. Deuter's products are regarded as being among the best in the world

### Gloves

#### Roeckl

Headquartered in Munich, Roeckl-Sporthandschuhe GmbH & Co. KG is a leading manufacturer of gloves enhancing the performance of cyclists, cross-country skiers, horseback riders and other athletes.

### Adidas

Herzogenaurach

#### Puma

Herzogenaurach

Shoes and sportswear

A fight among siblings caused Herzogenaurach, though a relatively small (pop. 23,000) city in central Franconia, to have two of the world's leading producers of shoes and other sporting goods.

In 1948, after 28 years of successfully manufacturing sport shoes, Adolf and Rudolf Dassler had a huge quarrel. It led to each of them founding his own company—Adolf, adidas; and Rudolf, Puma.



## Inside technology Bavaria: where researchers are free to explore

Bavaria's top-rated research community is a getting path-blazing institute.



source: www.dvondl.de

Groundbreaking in July 2009 for the facilities to house TU Munich's **Institute for Advanced Study**. Located in Germany's "Science City" of Garching (a northern Munich suburb), the Institute is headed by star research Patrick Dewilde. Its staff is to include 90 "fellows". From literally all around the world, these researchers share one key attribute: they are each the shakers and movers in their fields.



source: JUPITERIMAGES-0724535

Sponsored by the BMW Group, the IAS was set up to enable these fellows to pursue their research under optimal conditions. The researchers get to select their objectives, team line-ups and timetables. They are free to work alone or together.

Impetus for the founding of the IAS came from TU Munich's being selected by the German government in 2005 to be one of the country's three elite universities. These were then fast-tracked, via governmental support, for world-class development.

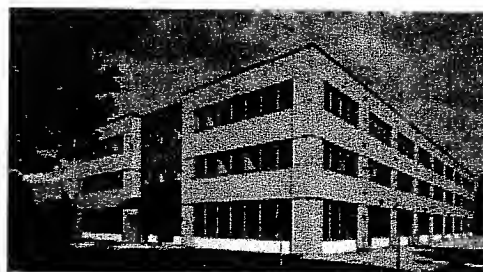
## New and newsworthy

### Foundation stone

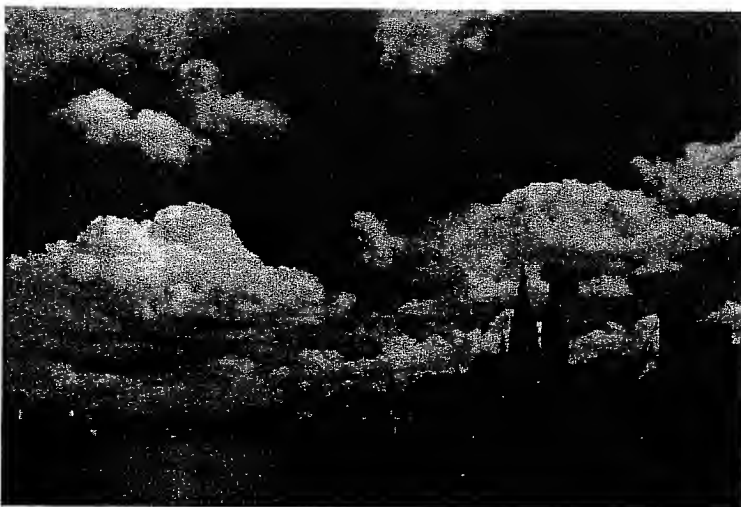
Building bigger for biotech in Regensburg

One wasn't big enough. So they built another. And now that's booked up.

So Regensburg's BioPark, one of Europe's leading biotech incubation centers, is now building a third segment. Upon completion in 2011, the €14.5 million annex will offer 6,000 square meters of utilizable space, bringing the BioPark's total to 18,000 square meters.



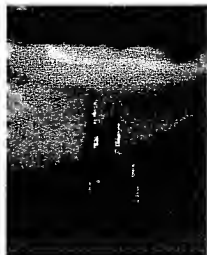
source: www.regenburg.de



source: Zou\_Innedia.com

## The lists: Bavaria's top tourist attractions

### Ludwig tops the list: palaces and castles



1. Neuschwanstein
2. Herrenchiemsee
3. Würzburg Residenz
4. Linderhof
5. Munich Nymphenburg
6. Munich Residenz

### Museums for technology, gardeners and art-lovers

1. Deutsches Museum (Germany's Smithsonian and the largest single museum of technology in the world) Munich 1.5 million visitors
2. Museum of Modern Art/Museum of 19th and early 20th Century Art/Museum of Art Munich's three adjoining Pinakotheks (art museums) attract 800,000 visitors a year
3. Botanical Gardens Munich 380,000 visitors a year
4. Museum of Humankind and Nature Munich 200,000 visitors a year

Source: State Ministry of Sciences

### Bavaria's biggest and smallest ... city

Munich (pop. 1.3 million) and Rothenfels (pop. 1052)

There are, of course, hundreds of villages and hamlets in the state which are smaller than Rothenfels.



Its size notwithstanding, Rothenfels has a lot to offer, including a great location (on the banks of the Main River and in the midst of northwestern Bavaria's huge and pristine Spessart Forest), a beautiful, medieval, half-timbered 'downtown', and a mighty castle, itself home to one of Germany's most famous youth hostels.

### Bavaria's biggest and smallest ... commercial airports



Its 34.5 million passengers and 432,000 flights (2008 figures) make Munich the largest of Bavaria's three commercial airports and the eighth largest in Europe. Number two is fast-rising Nuremberg.



Located in the western Bavarian city of Memmingen, the Allgäu Airport is the smallest and fastest-growing of the three.

After having registered 460,000 passengers in 2008, the AA recorded a 26% rise for the first six months of 2009, putting it on course for a 650,000-passenger year. An impressive rise – especially since it was racked up in a year in which the air industry has been grappling with the effects of the recession.

### Bavaria's biggest and smallest ... universities



Munich's Ludwig-Maximilians University has an enrollment of 45,000, making it the largest of Bavaria's 23 institutions of higher education.



The smallest is the University of Theological Philosophy. Forming part of the breathtakingly beautiful monastery located in the Alpine village of Benediktbeuern, the university has an enrollment of 90.

## For your event-scheduler Championships and tournaments in Bavaria in 2010

### December 31, 2009 – January 2, 2010

Garmisch-Partenkirchen

Ski jumping

Germany's leading winter sports resort is the venue for the second of the year's Four Ski Jumping Hills championships. This four-in-one event is one of the highlights of the ski jumping year.



source: JUPITERIMAGES-0720251

### January 8 – 10

Schönau am Königssee

Toboggan and Skeleton World Cup eve

Foremost event for fans of the ultra-fast ice-sliders

### January 13 – 17

Ruhpolding

Biathlon World Cup event

An intriguing mix of cross-country skiing and marksmanship, biathlon is wildly popular in central and northern Europe.



source: JUPITERIMAGES-0720251

### March 9 – 14

Skiing

Garmisch-Partenkirchen

The event in G-P is a main fixture on the Federation International de Ski's men's and women's World Cup circuits.



source: JUPITERIMAGES-0720251

### May 1 – 10

Tennis

Munich

BMW Tennis Open

95th International Bavarian Championship

Held in northern Munich's Iphitos stadium and one of the main events in Germany.

### May 2 – 5

Rottach-Egern

Long-distance mountain biking

Highly popular trans-Alpine event, covering 660 kilometers and scaling 15,300 meters of elevation in seven days



source: JUPITERIMAGES-0720251

### May 13 – 16

Equestrian sports

Munich

One of Europe's leading events and held in eastern Munich's Riem horse track.

## Bavaria goes abroad: trade fairs and business trips

Bayern International, Bavaria's international business development arm, is facilitating the following trips in 2009.

Delegations headed by Martin Zeil (Bavarian Minister of Economic Affairs) or by Katja Hessel (state secretary)

### Business trips: January 1 – March 31, 2010

**Dubai**, medical technologies, Jan 17 - 22

**Omar, Muscat**

**Doha, Qatar**

In association with the Arab Health trade fair

**Bolzano, Italy**

wood processing

Jan 21 – 22



#### For further information:

Bayern International  
[www.bayern-international.de](http://www.bayern-international.de)  
 (+49-89) 660 566 301

## At your service Trade fairs in Bavaria January 1 – March 31st, 2010

### Trade fairs in Munich:

[www.messe-muenchen.de](http://www.messe-muenchen.de)

#### inhorgenta europe 2010

February 19 – 22

Watches, jewelry, jewels and related technologies

[www.inhorgenta.com](http://www.inhorgenta.com)

#### f.r.e.e.

February 18 – 22

Leisure time products and services

[www.free-muenchen.de](http://www.free-muenchen.de)

#### ISPO Winter

#### SPORTS SOURCE EUROPE 2010

February 7 – 10

Sporting goods and sportswear

Sources of sporting goods and sportswear for the worldwide industry

[www.sports-source-europe.com](http://www.sports-source-europe.com)

#### IHM Privat/Profi

March 3 – 9

Equipment, services and supplies for and from the skilled trades and DIY sector

[www.ihmprivat.de](http://www.ihmprivat.de)

#### Analytica

March 23 – 26

Instruments, equipment and technologies for laboratories and in the M & R (measurement and regulation) and life sciences sectors

[www.analytica.de](http://www.analytica.de)

### Trade fairs in Nuremberg:

[www.nuernbergmesse.de](http://www.nuernbergmesse.de)

#### International Toy Fair

February 4 – 9

Leading event for the world's toy industry

[www.spielwarenmesse.de](http://www.spielwarenmesse.de)

#### Biofach

February 17 - 22

The world's largest event for organic foods and other products

[www.biofach.de](http://www.biofach.de)

#### embedded world

March 2 – 4

Embedded applications for automotive and other managers

[www.embedded-world.de](http://www.embedded-world.de)



source: Messe München





## Your key to our state

### Invest in Bavaria

**The Business Promotion Agency of the Bavarian Ministry of Economic Affairs, Infrastructure, Transport and Technology and Bayern International**

provides investors with the information and services needed to get them going to and growing in our state.

[www.invest-in-bavaria.de](http://www.invest-in-bavaria.de)

[info@invest-in-bavaria.de](mailto:info@invest-in-bavaria.de)

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### BusinessBavaria

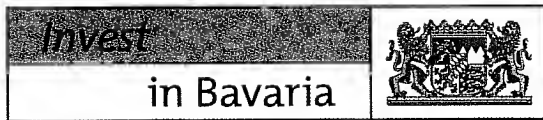
Editor-in-Chief: Alexandra Schmidhuber

Senior Journalist: Terry Swartzberg

Technical realization: Konrad Bayer



To stay up to date about the Bavarian economy on a daily basis use our RSS feed, which can be subscribed to at: [www.invest-in-bavaria.com/en/newsfeed](http://www.invest-in-bavaria.com/en/newsfeed)



**State of Bavaria**  
U.S. Office for Economic Development/  
West Coast Division

February 22, 2010

**State of Bavaria *Executive Business Breakfast and Networking***  
**St. Regis Hotel San Francisco, January 28<sup>th</sup>, 2010**

Thank you for joining our breakfast event at the St. Regis Hotel in San Francisco on January 28<sup>th</sup>! We hope we were able to provide useful information.

As our speakers pointed out, Bavaria is the top region in Germany for the dynamically growing optical technology industry.

Please see <http://www.bayern-photonics.de/> for more information.

The State of Bavaria U.S. West Coast Office is your partner for overseas business development, partnering and expansion projects. We offer individual and cost-free assistance in finding a business location and establishing contacts with key partners and industry experts in Bavaria.

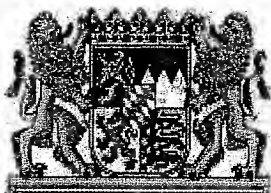
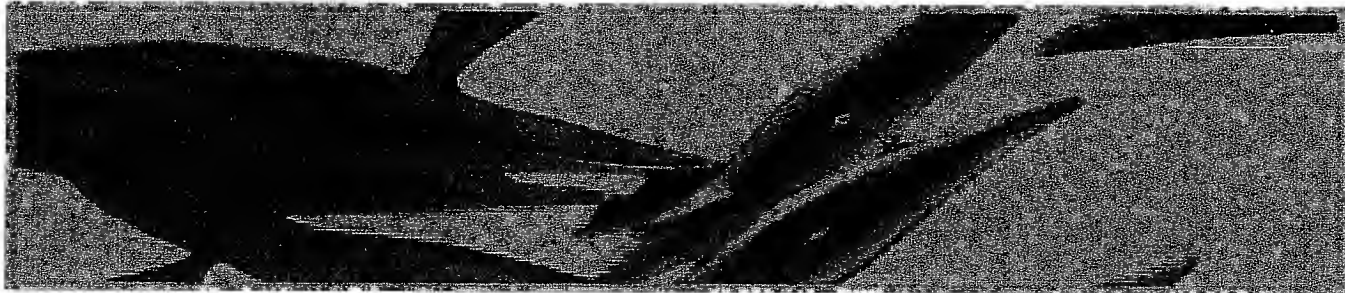
If you have any questions or like us to send copies of the presentations, please do not hesitate to contact us. We look forward hearing from you.

Sincerely,

Lucie E. Merkle

**State of Bavaria**  
**United States Office – West Coast Division**  
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Jan 13



On the occasion of **Photonics West 2010** in San Francisco  
you are cordially invited to join us for the

**State of Bavaria –  
Executive Business Breakfast and Networking**

***“High Tech Made in Bavaria: Photonics and Laser  
Technology”***

with presentations by

**Horst Sickinger, CEO**

**Katharina Jaklin, Communication Manager  
Bayern Photonics e.V., Munich**

**Joern Probst, Director - Business Unit Life Science  
Fraunhofer Institute ISC, Wuerzburg**

**Wilhelm Kaenders, President and CEO  
TOPTICA Photonics AG, Munich**

**Lucie E. Merkle, Executive Director  
State of Bavaria U.S. West Coast Office, San Francisco**



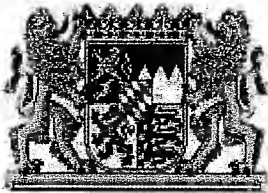
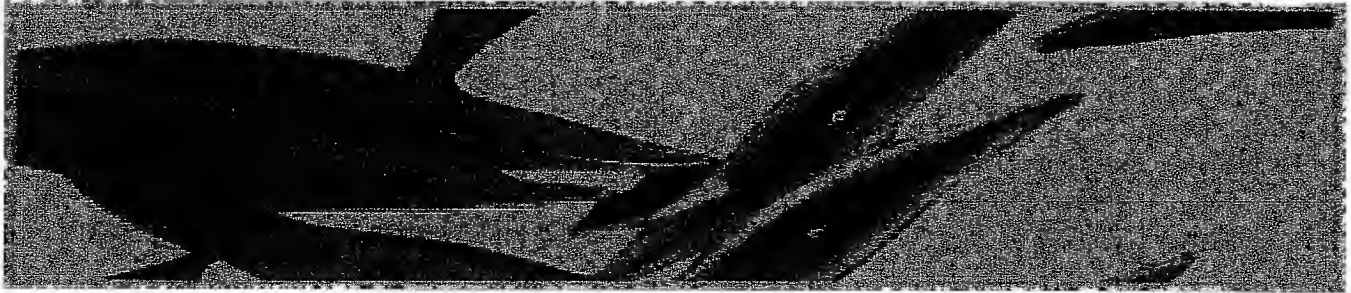
**bayern photonics**

Kompetenznetz Optische Technologien

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**Thursday, January 28<sup>th</sup>, 2010  
8.00 am – 10.00 am**

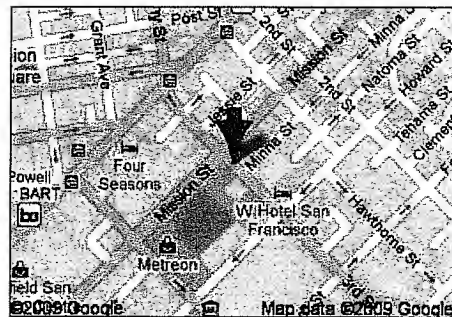
**St. Regis Hotel, San Francisco**  
125 Third Street  
Room Collection II



*Directions:*

**St. Regis Hotel**  
125 3rd Street  
San Francisco, CA 94103  
Room: Collections II

(5 minutes from the Moscone Convention Center)



**bayern photonics**

Kompetenznetz Optische Technologien

Please **RSVP** by January, 24<sup>th</sup>, 2010

Phone: +1 (415) 362 – 1001

Email: [sanfrancisco@bavaria.org](mailto:sanfrancisco@bavaria.org)

We are looking forward to welcoming you,

The State of Bavaria Team

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This material is circulated by the Bavarian Ministry for Economic Affairs, Infrastructure, Transport and Technology Office for Economic Development on behalf of the State of Bavaria, Federal Republic of Germany. Additional information is on file with the Department of Justice, Washington, D.C.

**Andrea Harrer**

**From:** San Francisco [sanfrancisco@bavaria.org]  
**Sent:** Friday, February 26, 2010 11:04 AM  
**Subject:** Newsletter "Business Bavaria" 2-2010  
**Attachments:** Newsletter\_Business Bavaria#02\_10.pdf; image001.png



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Dear friends and colleagues,

Please find attached our newsletter

***"Business Bavaria"***

This issue provides you with information and news about Bavaria's economy and business sectors, news on scientific research and groundbreaking developments, as well as tourist information.

You may also download this issue on our homepage:  
[www.invest-in-bavaria.de/fileadmin/pdf/newsletter/IB\\_Newsletter\\_0210\\_en.pdf](http://www.invest-in-bavaria.de/fileadmin/pdf/newsletter/IB_Newsletter_0210_en.pdf)

If you need specific information on Bavaria or have any questions, please don't hesitate to contact us anytime.

We hope you enjoy reading "Business Bavaria".

Best regards,

The State of Bavaria Team

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2/26/2010



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## What's inside

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### • Bavaria's tech designers:

designing product performance and pleasure

*Page three*

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Trade fairs, business trips

Bavaria at the Olympics, the Olympics in Bavaria

Carnival in Bavaria and the state's best

snowboarding

*Page four*

## Bavaria: the EU's best-performing base

The EU is comprised of some 1100 economic regions. Five of the Union's top ten performing regions (and 12 of the top 25) are located in Bavaria, making the state the Union's number one business base.

That's the findings of a sweeping and authoritative survey conducted on behalf of manager magazine and released in December 2009. The survey employed 25 key indicators – including relative numbers of scientists and technologists and of holders of advanced degrees – in coming up with its rankings. These indicators, in turn, were compiled from standardized data provided by Eurostat and other official sources.

Powering Bavaria to its best-in-Europe position were the impressive rises turned in by top ranking regions.

region	ranking 2010	improvement over 2007
Munich County	2	24 places
Ingolstadt	3	32 places
Munich City	5	67 places
Regensburg	8	70 places
Starnberg	9	104 places

## Munich: Europe's best airport

Munich ranks first among Europe's airports reports "The Travel Top Fifty 2009/10" compiled by the London-based Monocle monthly. Winning the airport its top ranking: "Munich's good signage, swift security and architecture say that it's an airport rather than a mall. These make it a perfect gateway to Bavaria and an even better hub for connections," states the prestigious business and lifestyle magazine.

### Right now from Bavaria and at Barcelona: the innovations making communication (even more) mobile

The people who came up with MP3 and many of the other apps driving mobile communication are coming to Barcelona for the Mobile World 2010 Congress, which will be held from February 15 – 18. **Invest in Bavaria: Booth 2F33.**



Source: www.munichcity-tourismservices.de

## Key figures

**First place. Twice.** Bavaria nabbed the two top spots in the rankings of numbers of research-driven manufacturers and technology-based service providers founded the past three years in Germany. The rankings were put together by Mannheim's ZEW Center for European Economic Research.

## Five minutes with..

**Franz Huber of Kartographie Huber, Munich**

[www.kartographie.de](http://www.kartographie.de)



From map-maker to maker of mapping technologies: that's the story of Munich's award-winning Kartographie Huber, which has gone from being a locally-based producer of printed maps to one of the world's leading suppliers of mobile and Internet-based map procurement, creation and customizing systems.

### Your company's...

#### ...most interesting breakthroughs:

Maps on demand – enables online-users to find, create, disseminate and print maps meeting their specifications, needs and wishes.

Online-GIS – teams up a powerful GIS (geo information system) search engine, a map generator and GPS capabilities.

#### ...prime source of personnel

...engineers from Bavaria's universities of applied sciences.

#### ...funding

...profits plowed back into the company, with support from Stadtparkasse München (Munich's municipal savings bank)

## Bavtech

### From Bavaria: the tools for the T-ray revolution

Scanners capable of stopping terrorists at airports and in entryways.

Wireless networks hundreds of times faster than today's WLAN or Bluetooth ones.

High clarity and control cancer detection and destruction systems not damaging human tissues. Quality control systems capable of remedying—as they operate—lacks of precision and perfection.

These are the killer apps now in the pipeline and involving Terahertz radiation, which occupies the band between the infrared and microwave segments, and which goes by the nickname 'T-rays'.

These are the killer apps now in the pipeline and involving Terahertz radiation, which occupies the band between the infrared and microwave segments, and which goes by the nickname 'T-rays'.

Putting these apps in the pipeline is an award-winning breakthrough developed by Thomas Hochrein and Karsten Kretschmer at the Würzburg's SKZ South German Center of Research into Plastics, working with Norman Krumbholz of the Technical University in Braunschweig.

Until these scientists came up with their breakthrough, T-rays could only be generated by ultra-delicate, huge and hugely expensive laboratory devices. And even these couldn't operate with the requisite power, reliability and precision.

The SKZ's breakthrough will produce systems, on the other hand, with the prices (80% less than conventional models), robustness (can be used in industrial operations), control and output enabling the above applications, among others.

### T-Rays: what they are capable of doing

ultra-safe travel and ultra-efficient manufacturing. Their ability to pass through fabric, paper, plastics and other materials, and to then generate 'spectral fingerprints' of underlying substances (such as explosives) will make T-rays the hearts of advanced inspection and security systems at airports and entryways. These same traits will be employed in quality control operations.

ultra high-speed and capacity wireless highways. T-ray links are hundreds of time faster than WLAN or Bluetooth.

better (more effective and with less side-effects) medical treatment. Unlike X-rays, T-rays are non-ionizing, meaning that they don't damage tissue and are much better at detecting and treating various kinds of tumors and other ailments.

## Inside the state

### Erlangen-Höchststadt: Germany's best business base

The central Franconian county has the country's most powerful business community. That's according to business weekly Focus Money, whose December 2009 survey ranked Germany's 401 counties and cities according to economic output and prospects.

Erlangen-Höchststadt helped power Bavaria to a very impressive performance. Six of the top ten and 20 of the top 30 finishers are located in the state.

The county's business community is comprised of well-established manufacturers of consumer goods, food processors, skilled trades firms and high-tech institutes and start-ups.

Their specialty, in turn, the technologies enabling communication and content creation in and via online and mobile environments.

The latest breakthroughs from Erlangen-Höchststadt: mobile grids telling drivers' GPS devices where parking spots are available and informing pedestrians, via mobile WLAN handhelds, about the sights and attractions of the neighborhoods they are walking through.

Also stemming from the county and specifically its Fraunhofer Institute for Integrated Circuits: systems giving radios and cinemas entire new broadcast capabilities.

**[www.iis.fraunhofer.de](http://www.iis.fraunhofer.de)**

## Bavaria's designers: designing tech performance and pleasure

Shanghai's gleaming new Metro. 3M's dental mixing unit. The world's leading E-ticketing and banknote processing devices.

They have something very important in common with Siemens mammography platforms, BMW sports cars, Audi coupes and MAN trucks.

Over the last two years, these products won major international prizes for designs. And these award-winning designs were created by Bavaria-based design teams.

"Bavaria's designers have a built-in advantage: proximity to companies which appreciate how design enables and expedites performance," notes Alexander Neumeister, long considered the dean of Bavaria's 10,000 professional designers.

High-speed and mass transit systems in Asia and Europe. Professional Hightech electronics and medical systems for the global market. Ships. The list of products designed by Neumeister and his partners Andreas Bergsträsser and Christiane Bausback at N + P Industrial Design GmbH is about as long as that of the awards conferred upon them.

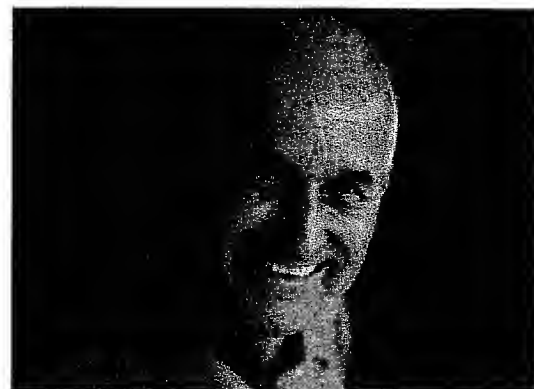
Since successful and hence design-appreciative world champions are found literally all throughout the state, it's not surprising that the well-known 'hotshops' show a commensurate diversity of location.

Take the western Bavarian town of Elchingen (pop.: 9,000). It is home to Busse Design + Engineering, one of the world's major design firms. Founded in 1959 by Rido Busse, the firm now has a staff of more than 40 designers and engineers. They handle no less than 250 projects a year.

Or take the northern Bavarian city of Coburg. Many of the top industrial designers staffing its hotshops are graduates from the local university of applied sciences' school of design. Among these hotshops: nexxon design.

In addition to going into business for themselves, graduates from Coburg, Munich, Nuremberg and other famous schools of design in Bavaria also find employment at BMW, Siemens and other major state manufacturers.

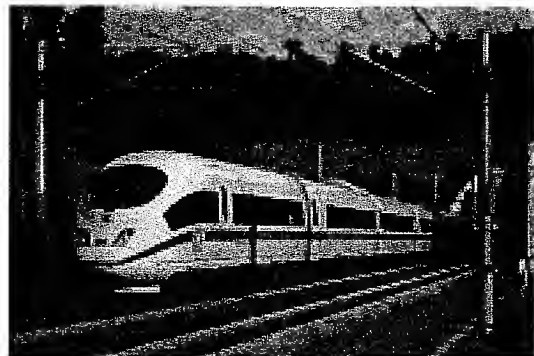
**For further information:**  
**Bayern Design**  
**[www.bayern-design.de](http://www.bayern-design.de)**  
**Bavaria's design promotion agency**



Source: [www.zwamp.de](http://www.zwamp.de); Alexander Neumeister



Source: [http://de.wikipedia.org/wiki/Alexander\\_Neumeister](http://de.wikipedia.org/wiki/Alexander_Neumeister)



Source: [http://de.wikipedia.org/wiki/Alexander\\_Neumeister](http://de.wikipedia.org/wiki/Alexander_Neumeister)

# bayern design

## Bavaria in your briefcase

### Bavarians for Olympia, Olympia in Bavaria

Maria and Susanne Riesch, Michael Greis, Magdalena Neuner and 34 other Bavarian champions will be participating in the XXI Winter Olympic Games, to be held in Vancouver and environs from February 12 – 28, 2010. A strong showing at the games will boost Munich's bid to host them in 2018.

### Don't miss events during the month

Fancy steps and fancy dress at Fasching 2010

Carnival in Bavaria – February 11 – 17

It starts on November 11th and soon spreads throughout much of the state: Carnival fever in Bavaria. This year's highpoint will come on February 16, when Munich and Bavaria's other communities go all out to celebrate Mardi Gras. Main venue in Munich is the Viktualienmarkt. In addition to colorful costumes and carousing, the city's downtown, open air market offers at 11 a.m. the "Dance of the Market Ladies", in which the women staffing the market's stall don fancy dresses and do an exhilarating mix of jigs and other fancy steps.

### David Benedek and the best snowboarding in Bavaria

He may be the best freestyle snowboarder in the world. He certainly was the first to achieve the sport's Holy Grail: the Double Corked 1260 jump. That was in 2006. And the Munich-born David Benedek is definitely also a highly successful filmmaker. Set up by him and his brother Boris and other partners, the Munich-based Blank Paper Studio is a major source of films and videos on snowboarding, surfing and other sporting and lifestyle pursuits.

### Benedek's best bets for boarding in Bavaria:

The Zugspitze. Germany's highest mountain and thus with the longest and often best snow in the country. It has a Snowpark and lots of off-trail fun.

Spitzingsee. A gathering point for great freestylers and the best Funpark in Bavaria. And it's so close to Munich that you can go there for a morning or afternoon.

Places to go when it's foggy: the Alpspitze peak and the Karwendel range. Both offer good visibility in all kinds of weather.

Video: Snowboarding at its best – in Garmisch-Partenkirchen

## Top trade fairs in February 2010 in

### ...Nuremberg

<http://www.nuernbergmesse.de/en>

### International Toy Fair

February 4 – 9

### BioFach

February 17 – 20

International organic trade fair

### ...Munich

<http://www.messe-muenchen.de/en>

### ispo 10

February 7 - 10

sporting goods and sportswear

### inhorgenta Europe 2010

February 19 – 22

Watches, jewelry, jewels and related technologies



Source: www.air-style.at



Source: www.spitzingsee.de





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Editor-in-Chief: Terry Swartzberg  
Technical editor and design: Konrad Bayer



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